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CUSTOMER EVALUATIONS OF SUPERMARKETS IN THREE AREAS OF THE COLUMBUS, OHIO MARKET

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Three neighborhoods of the Columbus market were selected to measure customer preferences for stores shopped, considerations that are important when selecting a store, importance of shopping aids, and to identify customer ratings of store performance.

A mail questionnaire was sent to 200 randomly selected households in each of the three areas. (A copy of the questionnaire is appended.) The three neighborhoods sampled were the Tremont area of Upper Arlington, the North High Street-Weisheimer Road area, and the Brice Road area north of I70.

The Tremont area can be characterized as one with a moderately high family income and mature families with relatively few members per household. The North High Street neighborhood is one of older families, many retired, with relatively modest family incomes. The Brice Road neighborhood is characterized by younger, larger sized households with moderately high incomes.

Two hundred questionnaires were mailed in each of the three neighborhoods. Two hundred thirty-one completed usable questionnaires were returned and included in the analysis, and 18 were returned as undeliverable. Thus, of those delivered, 40 percent usable questionnaires were returned. The questionnaires were sent out the last week of June, 1977.

Table 1A

Where Brice Road Area Residents Shop For Groceries,
Summer 1977

(N = 60)

	Big Bear	Fazio	Kroger	Tarpy's	Stumps	Other
Most Shopping	20%	5%	32%	0%	38%	2%
Other Store	23	2	23	23	11	18
Meat	12	2	25	3	41	17
Produce	35	3	26	3	31	2
Deli-Bakery	25	2	12	4	42	15
Advise Others	25	2	31	2	38	2

Where Residents Shopped

In the Brice Road area, 38 percent of the shoppers identified Stumps as the store where they usually bought most of their food. The other stores most frequently shopped are Big Bear, Kroger and Tarpy, with very similar numbers of residents indicating these stores as secondary choices.

Stumps has a high proportion of shoppers expressing a preference for this store for meat, produce and delicatessen-bakery products. Big Bear also has a large number of shoppers expressing a preference for this store as a source of produce.

Table 1B

Where North High Area Residents Shop For Groceries, Summer 1977

(N = 77)

	Big Bear	Fazio	Kroger	Tarpy's	Other
Main Shopping	39%	3%	26%	26%	6%
Second Store	22	4	9	45	20
Meat	26	0	23	30	21
Produce	42	3	21	28	6
Deli-Bakery	27	4	20	22	27
Advise Friend	37	4	20	27	12

In the North High Street neighborhood Big Bear was the choice of 39 percent of the shoppers with Kroger and Tarpy's at 26 percent each. Tarpy's was the choice of 45 percent of the residents as a second store.

For meat 30 percent shopped Tarpy's followed by Big Bear and Kroger. Forty-two percent shopped Big Bear for produce.

Table 1C

Where Tremont Area Residents Shop For Groceries,
Summer 1977

(N = 95)

	Big Bear	Fazio	Kroger	Tarpy's	Other
Main Shopping	72%	2%	8%	14%	4%
Second Store	22	3	14	41	20
Meat	63	1	5	20	11
Produce	62	2	6	21	8
Deli-Bakery	58	3	7	11	21
Advise Friend	59	4	11	19	7

In the Tremont area 72 percent of the residents shopped Big Bear for most of their food. Tarpy's was the choice of 41 percent as a second store shopped. Big Bear was the choice of 63 percent for meat, 62 percent for produce and 58 percent for deli-bakery.

Table 2A

Considerations Important in Store Selection, in Order of Importance,
Brice Road Area Shoppers,
Summer 1977

	Total	Rank 1	Rank 2	Rank 3
	(N=177)	(60)	(59)	(58)
Quality	19%	27%	14%	16%
Price	19	28	17	10
Clean and Neat Store	16	23	14	10
Location	11	12	8	14
Selection	11	3	15	16
Friendly	8	0	10	16
Service	6	2	10	7
Easy to Shop	4	3	5	3
Well Stocked	4	2	7	3
Other	2	0	0	5

Food quality and price were considered of about equal importance by Brice Road area shoppers when choosing a food store, followed by cleanliness, location and selection of merchandise.

The first four listed factors dominate the Rank 1 listing, Rank 1 is identified as most important in a possible listing of three considerations important to shoppers when selecting a food store.

Rank 3, or the third rated consideration, is fairly evenly distributed over the first six listed factors.

Table 2B

Considerations Important in Store Selection, in Order of Importance,
North High Area Shoppers,
Summer 1977

	Total	Rank 1	Rank 2	Rank 3
	(N=223)	(N=76)	(N=76)	(N=76)
Quality	22%	35%	19%	11%
Price	18	14	21	20
Location	18	22	14	12
Clean and Neat Store	12	11	14	7
Selection	10	11	14	4
Service	6	3	3	9
Other	4	0	4	10
Easy to Shop	4	1	3	7
Well Stocked	3	3	3	4
Friendly	3	0	5	3

The most important (Rank 1) consideration in store selection for the North High Street area is dominated by quality with location second. This is a considerable shift in responses when compared with the Brice Road neighborhood.

Price shows up strong as the second and third ranked choice.

This pattern of responses reflect the older aged households who may not wish to drive very far or may walk into the store, but who also put a considerable premium on good quality.

Table 2C

Considerations Important in Store Selection, in Order of Importance,
Tremont Area Shoppers,
Summer 1977

	Total	Rank 1	Rank 2	Rank 3
	(N=268)	(N=95)	(N=87)	(N=86)
Quality	22%	26%	28%	12%
Price	19	18	20	19
Location	16	27	6	13
Clean and Neat Store	13	7	15	16
Selection	9	9	9	9
Easy to Shop	7	2	8	12
Service	6	3	8	7
Friendly	5	2	2	10
Well Stocked	3	1	4	2

The Tremont area shopper puts a premium on quality and location in their first ranked important consideration in store selection. Their Rank 2 consideration is still dominated by quality factors, followed by price and cleanliness.

The pattern of responses reflect the small sized, mature, moderately high income families that are characteristic of this neighborhood.

Table 3

Age of 230 Shoppers, 3 Columbus Areas,
Summer 1977

Age	Brice Road	North High Street	Tremont
	(N=59)	(N=77)	(N=94)
Under 30	8.5%	5.2%	9.6%
30 - 45	47.4	20.8	24.5
46 - 64	42.4	41.6	42.6
Over 65	1.7	32.4	23.3

The information in Table 3 confirms the thoughts expressed earlier regarding the stage of family maturity. Note that almost 50 percent of the Brice Road families are included in the age bracket of 30 - 45 years, with very few over 65. The North High Street neighborhood has only about 20 percent of the families in the 30 - 45 year age bracket and almost a third of the families over 65 years of age. About two-thirds of the families in the Tremont area are those where the shopper is over 45 years old.

Table 4

Time to Travel from Home to Store for 229 Shoppers
3 Columbus Areas,
Summer 1977

	Brice Road	North High Street	Tremont
	(N=58)	(N=77)	(N=94)
0 - 5 minutes	60.3%	40.2%	73.4%
6 - 10 minutes	27.6	40.3	17.0
11 - 20 minutes	10.4	19.5	9.6
over 20 minutes	1.7	0.0	0.0

At first glance, the pattern of responses shown in Table 4 are surprising. On second thought, however, the shoppers in the North High Street area may be influenced by two factors. First, they do have some distance to travel to a second or third store, and second more of these shoppers may walk to the store in the neighborhood.

Table 5

Annual Income for 214 Households, 3 Columbus Areas, Summer 1977

	Brice Road	North High Street	Tremont
	(N=52)	(N=72)	(N=90)
Under $4,000	0.0%	2.8%	2.2%
$4,000 - 7,999	0.0	9.7	6.7
$8,000 - 11,999	5.8	11.1	10.0
$12,000 - 15,999	17.3	11.1	17.8
$16,000 - 19,999	11.5	18.0	11.1
$20,000 - 23,999	17.3	16.7	15.5
Over $24,000	48.1	30.6	36.7
Medium Income	$20,000-23,999	$16,000-19,999	$20,000-23,999

None of the three neighborhoods can be considered low income areas. Somewhat unexpected is the similarity in distribution of the lower income ranges of the North High Street and Tremont areas. Also somewhat unexpected is the high proportion of families in the Brice Road area having family incomes of over $24,000.

Number Eating at Home in 229 Households,
3 Columbus Areas,
Summer 1977

	Brice Road	North High Street	Tremont
	(N=59)	(N=76)	(N=94)
1	6.8%	13.2%	8.5%
2	15.2	40.8	43.6
3	16.9	21.1	22.3
4	40.6	18.4	18.1
5	10.2	3.9	4.3
6	5.1	2.6	3.2
7	3.4	0.0	0.0
8	0.0	0.0	0.0
9	0.0	0.0	0.0
10	0.0	0.0	0.0
More than 10	1.7	0.0	0.0
Average Size	3.70	2.80	2.76

The average size of families in the three areas reflect the age distribution of families in each area. Brice Road is a relatively newly developed area where a large proportion of families have children at home.

The North High Street and Tremont areas are neighborhoods where families are more mature or perhaps retired. In both areas just over 50 percent of the families consist of 1- or 2-member households.

Table 7

Expenditures Per Week at the Grocery Store for 214 Households,
3 Columbus Areas,
Summer 1977

	Brice Road	North High Street	Tremont
	(N=58)	(N=70)	(N=86)
$5 - 10	0.0%	1.4%	0.0%
11 - 20	3.5	8.6	10.5
21 - 30	10.3	28.6	15.1
31 - 40	22.4	22.9	24.4
41 - 50	24.1	15.7	22.1
51 - 60	6.9	5.7	8.1
61 - 70	10.3	5.7	10.5
71 - 80	12.1	7.2	5.8
81 - 90	3.5	1.4	1.2
91 - 100	5.2	2.8	2.3
More than 100	1.7	0.0	0.0
Average/Person	$11.62	$11.78	$14.49
Median Expenditure	$41-50	$31-40	$40-41

The pattern of family food expenditures reflects differences in income levels and household size between areas. Only 23 percent of the families in the North High Street area spent more than $50 per week on food. Twenty-eight percent of the Tremont families spent more than $50 per week. Almost 40 percent of the Brice Road families spent more than $50 per week for food.

The average expenditures per person are influenced by income levels, family size and age distribution of the families. The younger families of the Brice Road area have many other demands on their incomes.

Table 8

Importance of and Willingness to Change Brands or Stores for Certain Consumer Shopping Aids,

Tremont Area Residents, Summer 1977 (N=92)

Aid	Very Important	Important	Not Important	Don't Know	Would Change	Wouldn't Change	Uncertain
Open Code Dating	81%	15%	2%	2%	56%	30%	14%
Unit Pricing	58	26	14	2	38	47	15
Ingredient Listing	51	37	11	1	43	41	16
Fewer Chemicals	49	32	17	2	41	46	13
Nutritional Label	42	44	14	0	38	47	15
Item Pricing	83	15	2	0	68	21	11

North High Street Residents, Summer 1977 (N=74)

Aid	Very Important	Important	Not Important	Don't Know	Would Change	Wouldn't Change	Uncertain
Open Code Dating	72%	22%	5%	1%	49%	30%	21%
Unit Pricing	51	36	11	1	40	40	20
Ingredient Listing	55	33	12	0	45	33	22
Fewer Chemicals	49	37	11	3	39	39	22
Nutritional Label	49	33	18	0	40	41	19
Item Pricing	82	15	3	0	60	22	18

Brice Road Area Residents, Summer 1977 (N=59)

Aid	Very Important	Important	Not Important	Don't Know	Would Change	Wouldn't Change	Uncertain
Open Code Dating	77%	17%	3%	3%	60%	30%	10%
Unit Pricing	49	42	7	2	46	43	11
Ingredient Listing	49	42	9	0	50	34	16
Fewer Chemicals	42	39	17	2	44	40	16
Nutritional Label	39	44	17	0	33	51	16
Item Pricing	75	24	1	0	68	23	9

Shopping Aid Issues

All of the topics listed in Table 8 are rated as very important or important in this survey by over 80 percent of the shoppers. This illustrates why many of these topics have been popular legislative issues. In an effort to get some indication of how willing shoppers might be to take action in line with their attitudes, a second question asks how many would change stores or brands to have this shopping aid. In all cases the indicated actions for change were a smaller portion of the total than the percentage indicating the topic was very important or important to them.

There appears to be no really significant difference between neighborhoods in regards to support for the issues identified or for the expressed willingness to change stores to have that particular shopping aid available.

Of some interest is the indication that of all of these issues, the greatest support is for continued item pricing. The next most supported issue is open code dating.

Table 9

Frequency of Shopping at In-Store Bakery-Deli for 225 Shoppers,
3 Columbus Areas,
Summer 1977

	Brice Road	North High Street	Tremont
	(N=57)	(N=75)	(N=93)
More than once a week	3.5%	5.3%	8.6%
Once a week	29.8	21.3	29.0
1 - 3 times a month	35.1	26.7	40.9
Less than once a month	22.8	34.7	17.2
Never	8.8	12.0	4.3

The smaller proportion of customers shopping in store bakery-deli departments in the North High Street neighborhood probably reflects two things. One, a full-line in-store bakery-deli operation is less accessible, location-wise, to residents at this area. Second, this is a neighborhood with a higher proportion of older people who may be less willing to change buying habits.

The distribution of shopper patterns in the other two areas are quite similar. Of some interest is the fact that less than 40 percent of the residents patronize in-store bakery-deli departments on their weekly shopping trip.

Food Store Ratings

Shoppers were asked to rate the stores where they shopped. Each aspect of store operations was given an A, B, C, D rating. These letter ratings were converted to A=4, B=3, C=3, D=4 number ratings where a perfect rating would be 4.0.

Past experience with the overall rating has indicated that a rating of 3.3 or above is excellent, 3.0 is average and below 2.6 is equivalent to failure. In fact, most stores who, in the past, have received overall ratings at below 2.6 have not survived over a period of years.

In the Brice Road area the overall rating for Big Bear, Kroger, and Tarpy's is almost the same. Stumps rating is the highest ever attained by a supermarket over a decade of store ratings in many communities. Tarpy's shows up especially strong for meat, produce, courtesy, cleanliness and parking.

In the North High Street neighborhood, Big Bear is rated highest overall, followed by Tarpy's. Here again Tarpy's is especially highly rated on meat, produce, convenience of location, courtesy and cleanliness.

In the Tremont neighborhood, Big Bear is most highly rated followed by Tarpy's. Big Bear has a very consistent high rating of various aspects of store operations. Tarpy's overall rating is tempered by relatively low price, weekly specials and shopping ease images.

In all three neighborhoods, Fazio has a relatively poor rating across all aspects of store operations except price and weekly specials. These ratings are so low, in fact, that unless there are major changes in management strategy, Fazio's long term viability is questionable.

Table 10A

Food Store Ratings by 59 Brice Road Area Shoppers, Summer 1977

	Big Bear	Fazio	Kroger	Tarpy's	Stump's
	(N=43)	(N=14)	(N=39)	(N=33)	(N=32)
Meat quality	3.02	1.92	2.92	3.66	3.61
Fresh fruits and vegetables	3.37	2.31	3.13	3.52	3.12
In-store bakery-deli	3.08	2.44	2.84	3.13	3.16
Selection of merchandise	3.35	2.79	3.25	3.27	3.69
Prices	2.39	3.43	3.11	2.25	2.81
Low priced weekly specials	2.77	3.38	3.31	2.68	2.93
Convenience of store location	3.38	2.23	3.38	3.33	3.72
Courtesy and friendliness	3.10	1.92	3.05	3.55	3.87
Cleanliness and neatness	3.55	1.76	3.31	3.55	3.78
Ease of shopping in the store	3.12	1.86	3.10	3.27	3.78
Accurate, quick check-out	2.88	2.21	2.95	3.48	3.84
Parking facilities	3.45	2.71	3.36	3.52	3.56
Availability of specials	3.44	2.75	3.46	3.40	3.63
Availability of coupons	3.58	3.42	3.66	3.41	3.60
Overall Store Rating	3.16	2.38	3.18	3.16	3.86

a/ Perfect score is equal to 4.00 or grade of A.

Table 10B

Food Store Ratings by 77 North High Street Area Shoppers, Summer 1977

	Big Bear	Fazio	Kroger	Tarpy's
	(N=57)	(N=25)	(N=37)	(N=54)
Meat quality	3.02	2.44	3.22	3.74
Fresh fruits and vegetables	3.68	2.88	3.06	3.43
In-store bakery-deli	3.03	2.87	2.96	2.96
Selection of merchandise	3.77	3.09	3.16	3.33
Prices	2.86	3.26	3.41	2.58
Low priced weekly specials	3.24	3.29	3.46	3.02
Convenience of store location	3.50	2.54	3.41	3.66
Courtesy and friendliness	3.56	2.40	3.50	3.53
Cleanliness and neatness	3.75	2.54	3.19	3.59
Ease of shopping in the store	3.62	2.28	3.42	3.11
Accurate, quick check-out	3.33	2.04	3.15	3.54
Parking facilities	3.67	2.88	3.72	2.50
Availability of specials	3.57	2.72	3.41	3.44
Availability of coupons	3.61	3.25	3.46	3.33
Overall Store Rating	3.55	2.64	3.31	3.42

a/ Perfect score is equal to 4.00 or grade of A.

b/ Data were collected prior to the closing of Kroger's Graceland store.

Table 10C

Food Store Ratings by 95 Tremont Area Shoppers, Summer 1977

	Big Bear	Fazio	Kroger	Tarpy's b/
	(N=84)	(N=31)	(N=38)	(N=63)
Meat quality	3.36	2.46	2.83	3.71
Fresh fruits and vegetables	3.49	2.73	3.00	3.67
In-store bakery-deli	3.26	3.25	2.93	3.37
Selection of merchandise	3.56	3.04	3.32	3.41
Prices	2.80	2.84	3.11	2.55
Low priced weekly specials	3.09	3.21	3.14	2.95
Convenience of store location	3.86	2.23	2.56	3.73
Courtesy and friendliness	3.56	2.17	2.84	3.61
Cleanliness and neatness	3.75	2.52	3.05	3.52
Ease of shopping in the store	3.76	2.11	3.19	2.89
Accurate, quick check-out	3.46	1.79	2.94	3.44
Parking Facilities	3.59	2.80	3.46	3.44
Availability of specials	3.56	2.54	3.15	3.64
Availability of coupons	3.65	3.20	3.36	3.62
Overall Store Rating	3.56	2.50	2.97	3.42

a/ Perfect score is equal to 4.00 or grade of A.

b/ Only 27 rated in-store deli-bakery.

June 25, 1977

To: Selected Food Store Customers in the Central Ohio Area

Food quality, prices, packaging, ingredients, convenience, selection of brands, employee courtesy, cleanliness, freshness, and many other items are of some importance to most food store customers. May I ask you to help me learn about your views and values and what is important to you when buying food?

This survey and its results will be very helpful to me, as a student, in completing requirements for graduation from Ohio State University. The results will be used in a research project I am conducting in my area of study-food marketing.

The results will also be useful to other students studying food marketing, to consumers, and to managers of stores as they seek to better serve their customers.

The Central Ohio area represents a good cross-section of Ohio's food store customers. You have been included in the survey as a resident of this area.

You do not need to identify yourself on the questionnaire. A self-addressed, postage paid envelope is attached for your convenience in returning the questionnaire.

Your cooperation will enable me to complete my project. I would like to express my thanks to you for taking your time to help me by completing the enclosed questionnaire and returning it to me by July 10.

Sincerely,

Bruce A. Bradley

Bruce A. Bradley
Student, Food Marketing

Lois Simonds

Lois Simonds
Faculty Advisor
2120 Fyffe Road
Columbus, Ohio 43210

OHIO STATE UNIVERSITY MARKET SURVEY

1. Where do you buy most of your groceries?

   STORE NAME______________________LOCATION________________________

2. What other food store do you most frequently shop in?

   STORE NAME______________________LOCATION________________________

3. Where do you buy <u>most</u> of your meats?

   STORE NAME______________________LOCATION________________________

4. Where do you buy <u>most</u> of your fresh fruits and vegetables?

   STORE NAME______________________LOCATION________________________

5. Where do you buy <u>most</u> of your bakery-delicatessen items?

   STORE NAME______________________LOCATION________________________

6. If a friend asked your advice on the best place to buy food, what store would you suggest?

   STORE NAME______________________LOCATION________________________

7. What is the age of the person who does the food shopping? (Please check one.)

   UNDER 30________ 30-45________ 46-64________ OVER 65________

8. How much time does it take you to travel from your home to the store where you buy most of your groceries?___________MINUTES

9. What considerations are the most important to you in selecting a food store? (List three reasons in order of importance.)

   1.____

   2.____

   3.____

10. How often do you buy items from an in store bakery-delicatessen?

    More than once a week?_______ Weekly?________1-3 times a month?______

    Less than once a month?_______ Never?________

11. What do you like about in-store bakery-delicatessens?

    ____

12. Have you changed stores within the past year to one that has an in-store bakery-delicatessen?

    YES_______ NO________

13. How important are the following ideas to you? Please circle A, B, C, or D for each item. (A=very important, B=important, C=not important, D=don't understand this.)

Open code dating of perishable foods	A	B	C	D
Unit pricing (Price per ounce or pound)	A	B	C	D
All ingredients listed on the package	A	B	C	D
Fewer chemical additives	A	B	C	D
Nutritional information on package	A	B	C	D
Item pricing (Price on each item)	A	B	C	D
Other (Identify)_______________	A	B	C	D

14. I would be willing to change stores or brands to have the following: (Please check.)

	YES	NO	UNCERTAIN
Open code dating of perishable foods	____	____	____
Unit pricing (Price per ounce or pound)	____	____	____
All ingredients listed on the package	____	____	____
Fewer chemical additives	____	____	____
Nutritional information on package	____	____	____
Item pricing (Price on each item)	____	____	____
Other (Identify)_______________	____	____	____

15. Why do you feel some people prefer to shop at "warehouse food stores" rather than ordinary supermarkets? (Please check.)

_____ Lower prices
_____ Selection
_____ Bulk buying
_____ Do not mind bagging own groceries
_____ Do not mind price marking own groceries
_____ Other (Identify)_______________
_____ Other (Identify)_______________
_____ Don't know

16. Have you shopped a "warehouse food store " in the last six months?_______________

17. Do you shop "warehouse food stores" regularly?__________
Once a month or more?__________

18. Why do you feel some shoppers may not like "warehouse food stores"?

____

19. What is the total number of people in your household, who usually eat at home?__________

20. About how much do you spend each week in food stores? $__________

21. What is your approximate family income per year? (Please check one.)

Under $4,000	____	$16,000-19,999	____
$4,000-7,999	____	$20,000-23,999	____
$8,000-11,999	____	Over $24,000	____
$12,000-15,999	____		

PLEASE RATE THE FOOD STORES WHERE YOU SHOP, BASED ON YOUR IMPRESSIONS OF THEM. PLEASE USE THE RATING SYSTEM BELOW.

EXAMPLE:
(A) Excellent
(B) Good
(C) Fair
(D) Poor

Please circle A, B, C, or D for each rating.

	Big Bear	Fazio
Parking	A B C D	A B C D

Please write in the name of the food store you usually shop, if not identified.

	Big Bear	Fazio	Kroger	Tom Tarpy's	
Meat quality	A B C D	A B C D	A B C D	A B C D	A B C D
Fresh fruits & vegetables	A B C D	A B C D	A B C D	A B C D	A B C D
In-store Bakery-Delicatessen	A B C D	A B C D	A B C D	A B C D	A B C D
Selection of Merchandise	A B C D	A B C D	A B C D	A B C D	A B C D
Prices	A B C D	A B C D	A B C D	A B C D	A B C D
Low priced Weekly specials	A B C D	A B C D	A B C D	A B C D	A B C D
Convenience of Store location	A B C D	A B C D	A B C D	A B C D	A B C D
Courtesy & Friendliness	A B C D	A B C D	A B C D	A B C D	A B C D
Cleanliness & Neatness	A B C D	A B C D	A B C D	A B C D	A B C D
Ease of shopping in the store	A B C D	A B C D	A B C D	A B C D	A B C D
Accurate, quick Checkout service	A B C D	A B C D	A B C D	A B C D	A B C D
Parking facilities	A B C D	A B C D	A B C D	A B C D	A B C D
Availability of Advertised Specials	A B C D	A B C D	A B C D	A B C D	A B C D
Availability of Coupons	A B C D	A B C D	A B C D	A B C D	A B C D
Other (IDENTIFY) ______	A B C D	A B C D	A B C D	A B C D	A B C D
Overall rating of store	A B C D	A B C D	A B C D	A B C D	A B C D

THE ENCLOSED RETURN ENVELOPE DOES NOT REQUIRE POSTAGE

Thank you for taking your time to respond to my request for information.